BMC Remedy

Version 8

# USER GUIDE
# FIRST TIME USERS

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State of Tennessee
Department of Finance and Administration
Office for Information Resources

# Revision History

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|---|---|---|
| 02/28/15 | Initial document in new format | Remedy Team |
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| | | |
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# 1   Introduction

The Remedy application is the Office for Information Resources' (OIR's) request-centric enterprise suite of applications that provides the ability to record and track, manage, communicate, automate, and document the various processes involved in its offering of IT services to Tennessee State agencies. Remedy is built on industry standard ITIL processes for the delivery of services to the customer.

Remedy 8.0 system is the newest version available for Remedy modules. This latest version adopts the new best practice views to improve the user experience.

## 1.1   Purpose of this Document

The purpose of this document is to provide new users with instructions for logging into Remedy and setting up a customized home page.

# 2   Getting Started

## 2.1   Open the Remedy Application

First open your browser and enter one of the following links.

- **From the State Network (Intranet):** https://remedy.tn.gov Internet

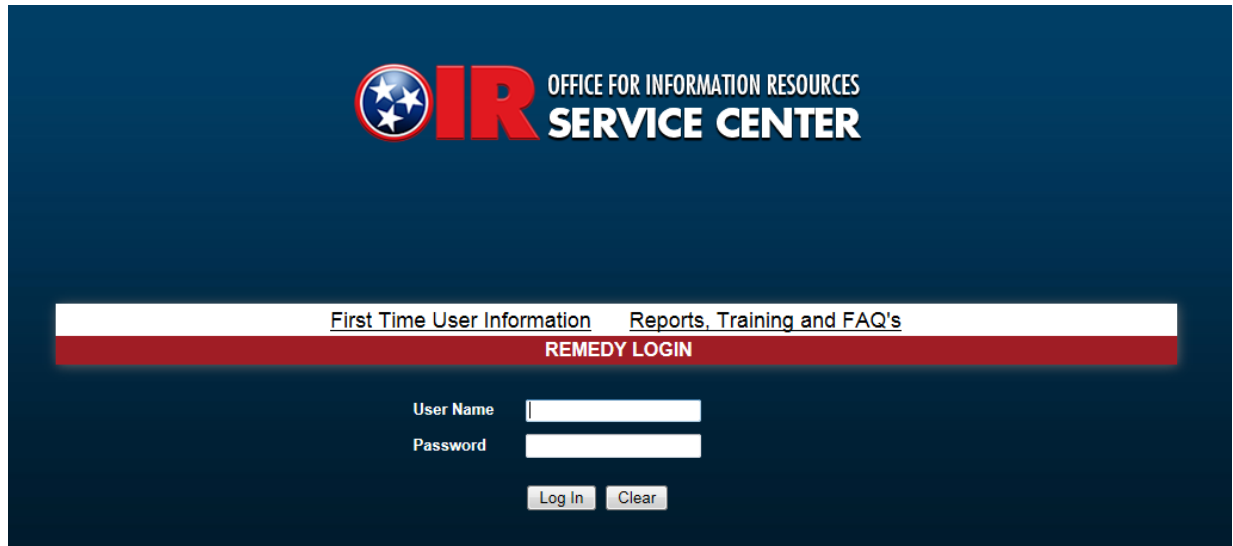- **From the Internet:** https://myremedy.tn.gov



**Figure 2-1: Remedy Login Screen**

## 2.2   Login Instructions:

### 2.2.1   F&A OIR Active Directory Account

1) In the **User Name** field enter your RACF ID in lower case.
2) In the **Password** field enter your Active Directory (network) login.
3) Click the **Log In** button.

### 2.2.2   No F&A OIR Active Directory Account

1) In the **User Name** field enter your RACF ID in lower case.
2) In the **Password** field enter your Remedy password.
3) Click the **Log In** button.

### 2.2.3   Vendor Account

1) In the **User Name** field enter your assigned User ID in lower case.
2) In the **Password** field enter your Remedy password.
3) Click the **Log In** button.

### 2.2.4   Benefits ABC Person

1) In the **User Name** field enter your Edison ID in lower case.

2) In the **Password** field enter your Remedy password.
3) Click the **Log In** button.

If you have trouble logging in, please call the
OIR Service Desk at 615-741-1001, Option #3

The web server will automatically log you out after 90 minutes of inactivity.
If you remained logged into Remedy overnight, please logout and close
your brower before logging back into Remedy.

# 3 The Default Home Page

Once you have successfully logged into the Remedy application, your default home page will depend on whether you are a Service Catalog user or a Support User.

## 3.1 Service Catalog Users

Service catalog users are non-support users who are not going to be managing incidents, work orders, requests, or changes. Depending on which agency you belong affects exactly what you can see. The default home page you see should resemble the following screen.
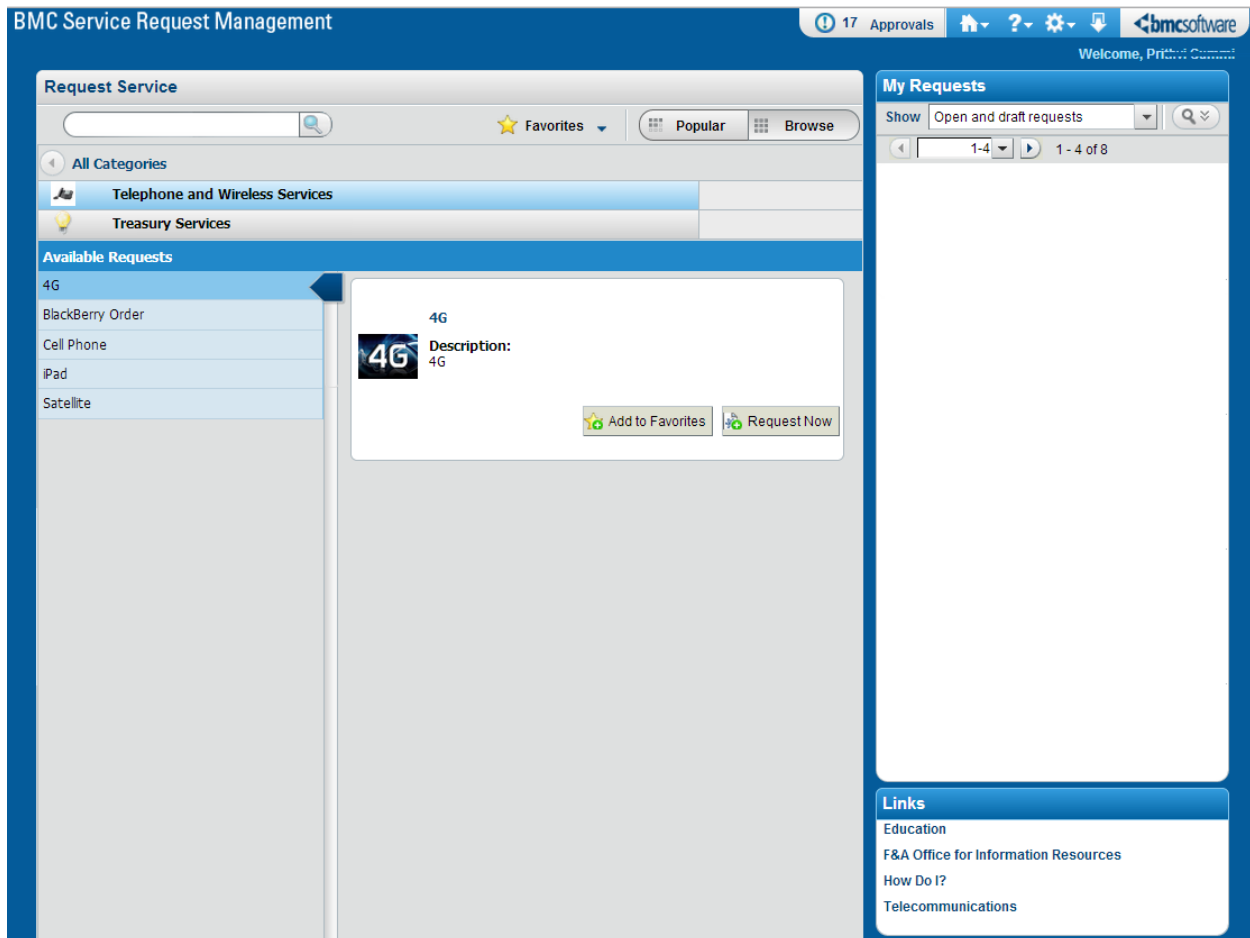


**Figure 3-1: Service Catalog User Home Page**

## 3.2   Support Users

Support users are people who have special Remedy licenses and use the system to manage, monitor, and resolve incidents, work orders, asset management, and change management items. The default home page for these users will be similar to the screen below
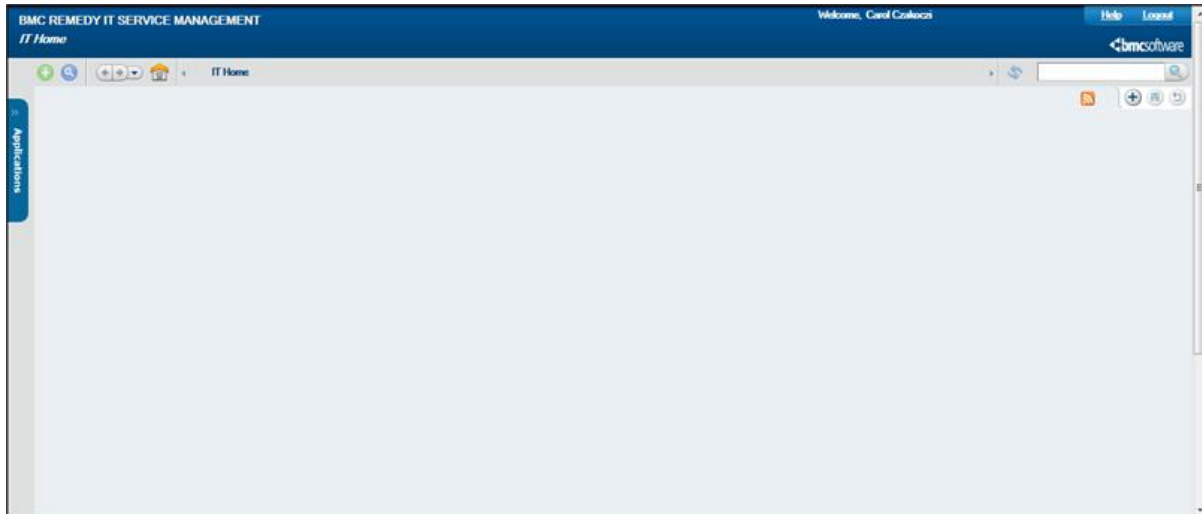


**Figure 3-2: Support User Home Page**

This screen can be customized to show the console that is most useful to you or to display several modules if you work with different items.

### 3.2.1   Navigation from the Applications Tab

1) On the left side of the home page screen you will always see the **Applications** Tab.

2) Click on it to expand it one level.

3) Move your mouse up and down the listing and the menu will expand to the right, as shown in the sample below.

**NOTE:** Your view of the Applications tab will differ depending on your user configuration.



**Figure 3-3: Applications Tab expanded**

4) Click on an item in the right-most expanded menu to select it and open a new screen.

5) Click on the **Applications** tab a second time to collapse it.

### 3.2.2   Setting One Console for Your Home Page

If you are a support user who will only use one console (such as only the Incident Management Console), you can put that on your home page so that once you log into Remedy you see it right away, without needing to use the Application tab for navigation.

The following instructions will work for any console (Asset Management, Change Management, Incident Management, Work Order Management, etc.)

1) Using the **Applications** tab instructions in Section 3.2.1, click on the console you wish to open. For the following examples, the **Incident Management Console** was used.



**Figure 3-4: Open the Console**

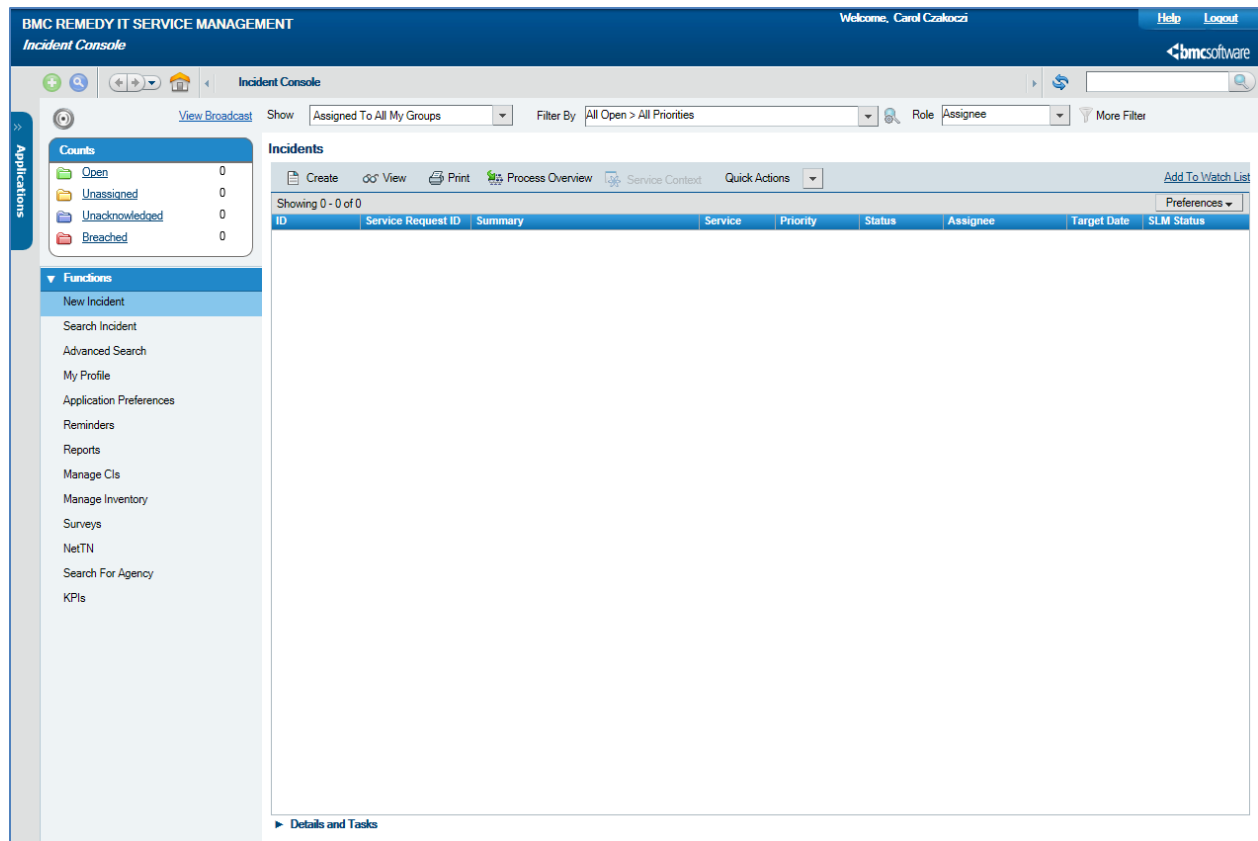The **Incident Management Console** opens up as shown below.

**Figure 3-5: Incident Management Console**

2) On the **Functions** menu on the left side, select **Application Preferences** as shown below.
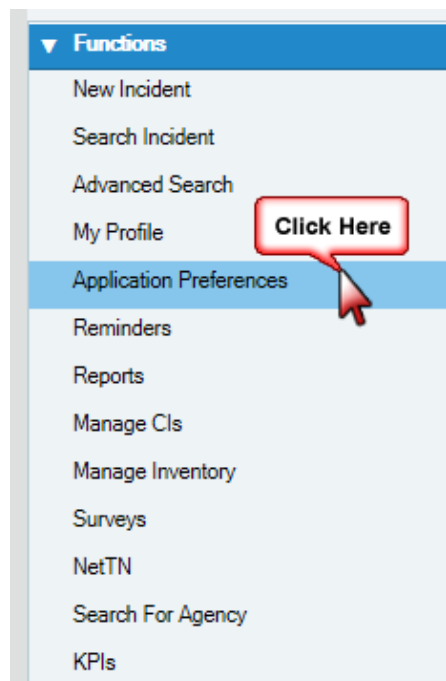


**Figure 3-6: Select Application Preferences**

3) The **Application Preferences** popup window is displayed. Click on the down arrow on the **Default Home Page** field. (See Figure 3-7.)

4) **Select** the desired console from the drop-down list (your options may differ depending on your user configuration).
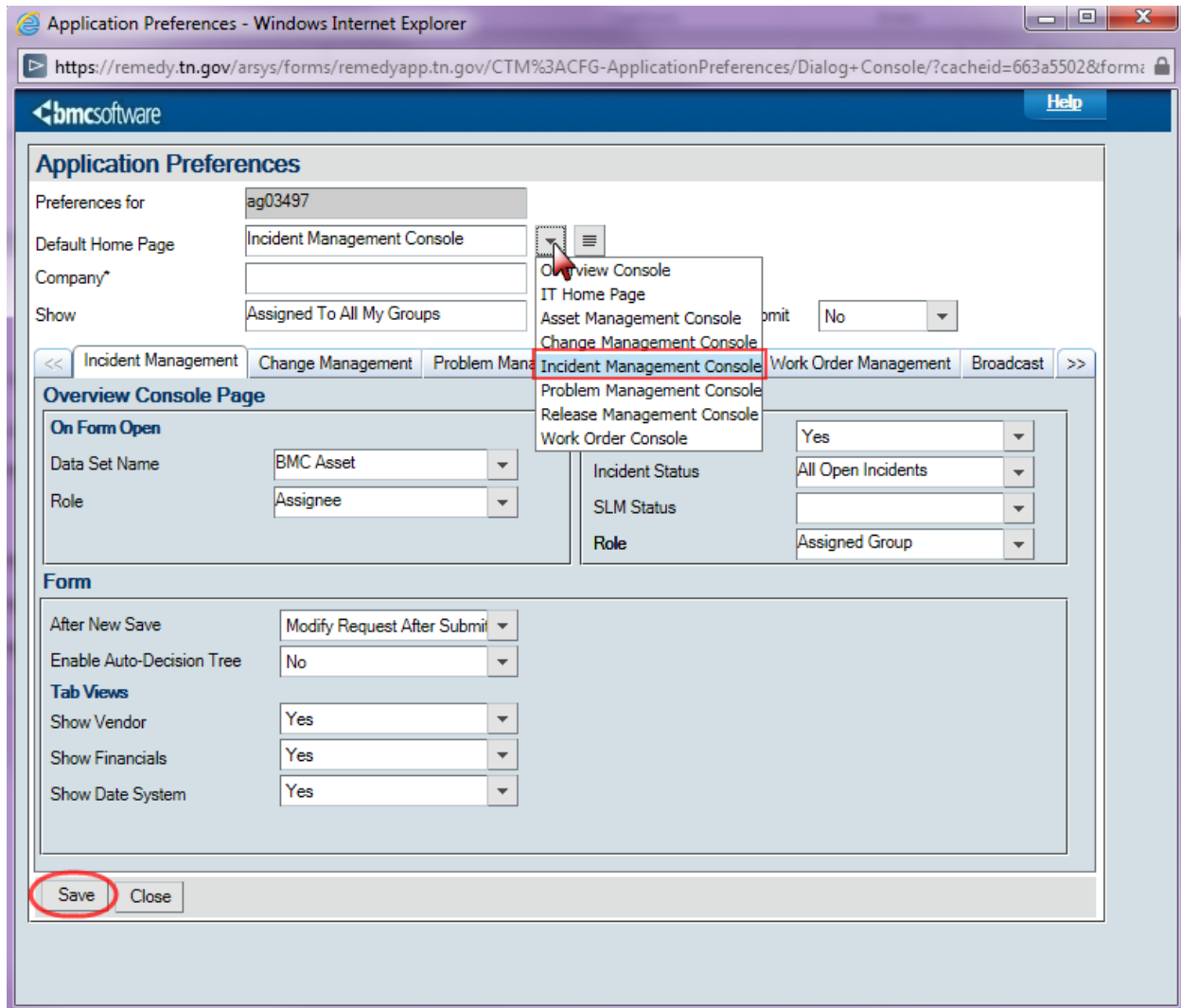
5) Click the **Save** button to save your changes.



**Figure 3-7: Application Preferences Popup Window**

This will make the console you selected appear on your home page when login to Remedy the next time.

You can still navigate to other consoles using the Applications Tab, as described in Section 3.2.1.

If you want to select the IT Home Page as your default home page, please refer to Section 3.2.3.

**NOTE:** Sometimes you may see a warning message popup, similar to the one shown below; just click **OK** to close it.
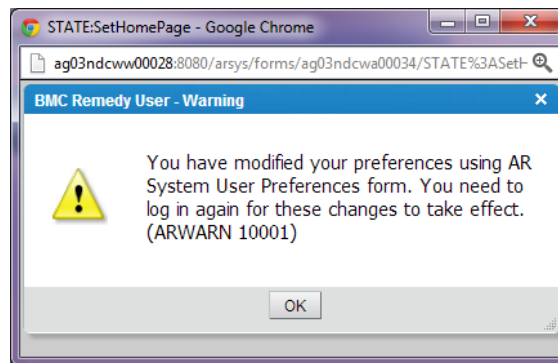


**Figure 3-8: Warning Message**

### 3.2.3 Selecting the IT Home Page as your Default

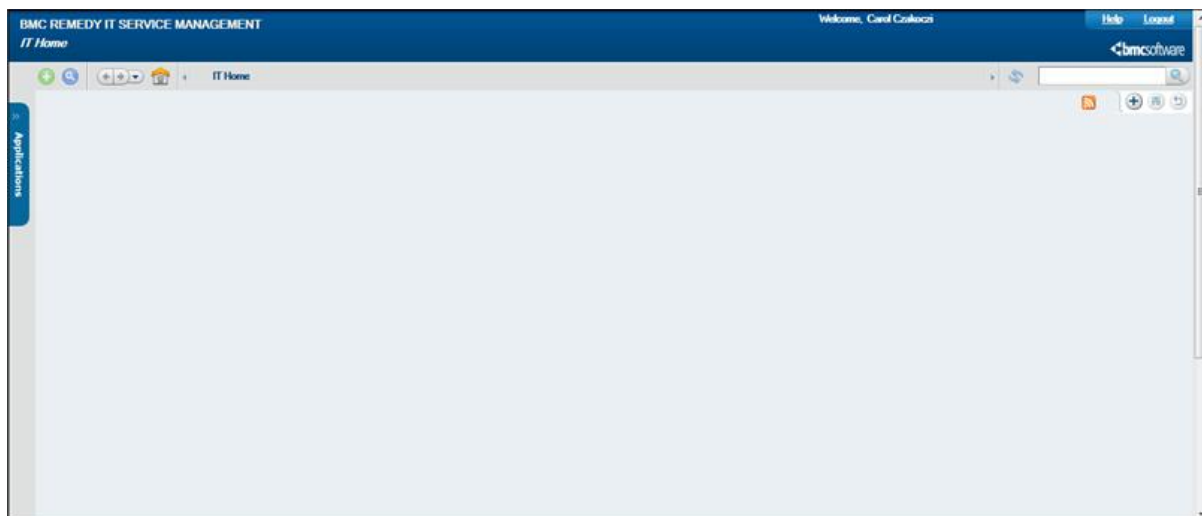If you select IT Home Page as your console (see Figure 3-7), you will see the following



**Figure 3-9: IT Home Page**

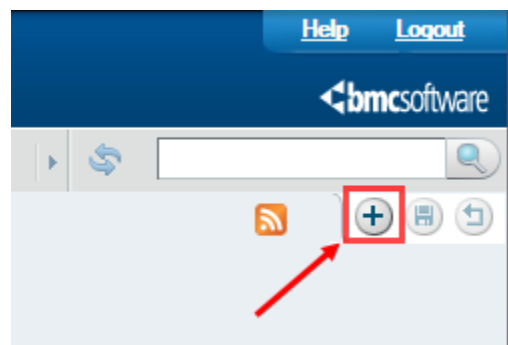In the upper right corner of the page, click on the **+** button to customize the page.



**Figure 3-10: Customize IT Home Page Button**

The page will display with four different sections, labeled in the figure below as A – D. You can choose to customize all four sections or close one or more, depending on what you would like to see and how you want to see it. All four sections function the same way.
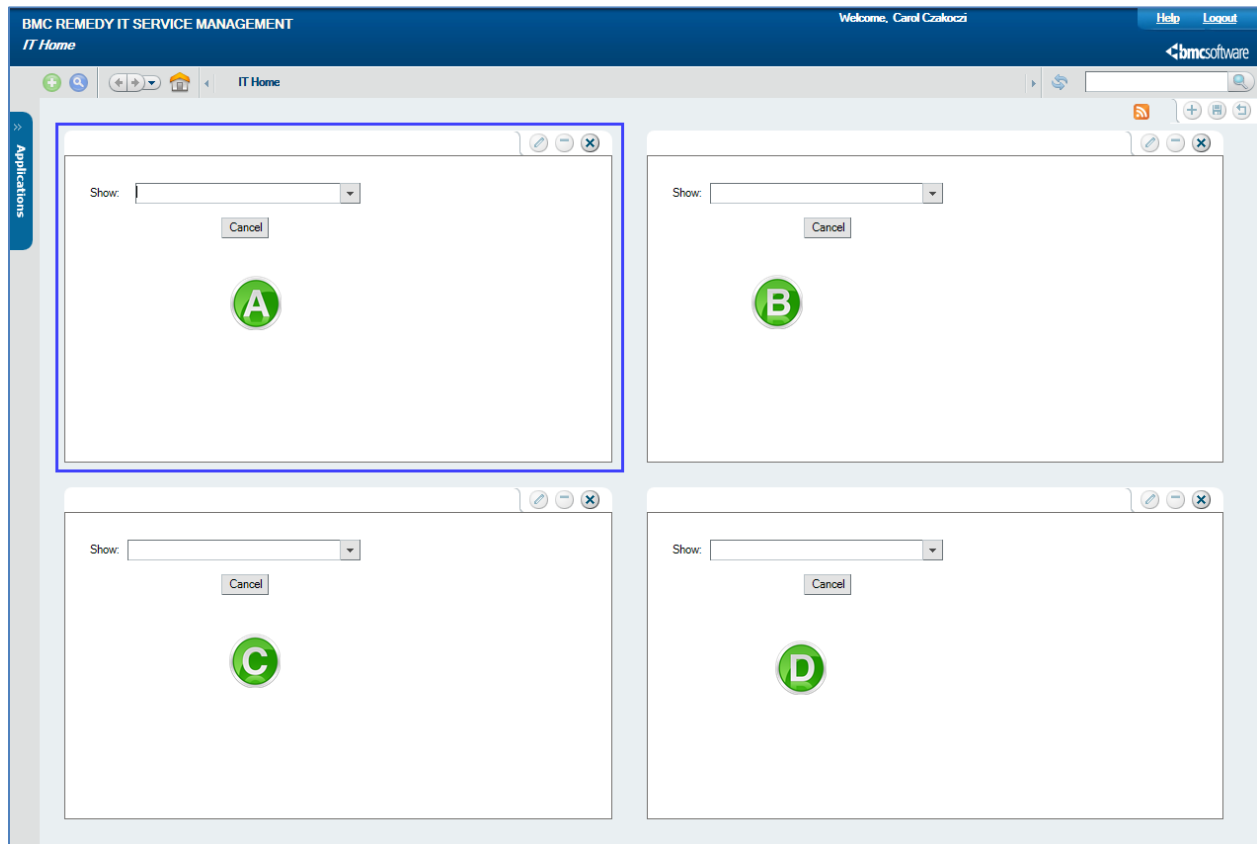


**Figure 3-11: IT Home Page – Four Sections**

Close (or remove from view) a section by clicking on the **X** button in the top right. Closing a section allows the other sections to expand and fill in the space.
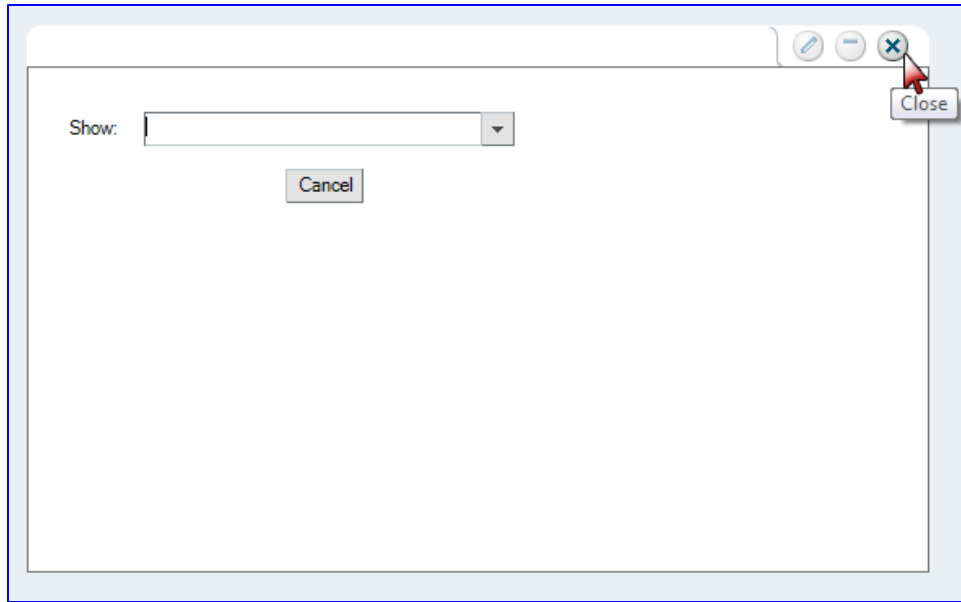
**Figure 3-12: Close a Section on the IT Home Page**

It is recommended that you first decide what you want to see before closing sections. For example if you want two screens to span the page horizontally, customize sections A and C and close B and D. If you want two screens side-by-side, customize sections A and B and close C and D.

For the following examples the goal is to be able to view the Incident Console and the Work Order Console on one page. Since each console contains several columns, it is best if each console were to span the page horizontally.

Starting with section A, click the **Show** field's drop-down arrow and navigate to the desired screen. Figure 3-13 depicts the navigation to the Incident Console.
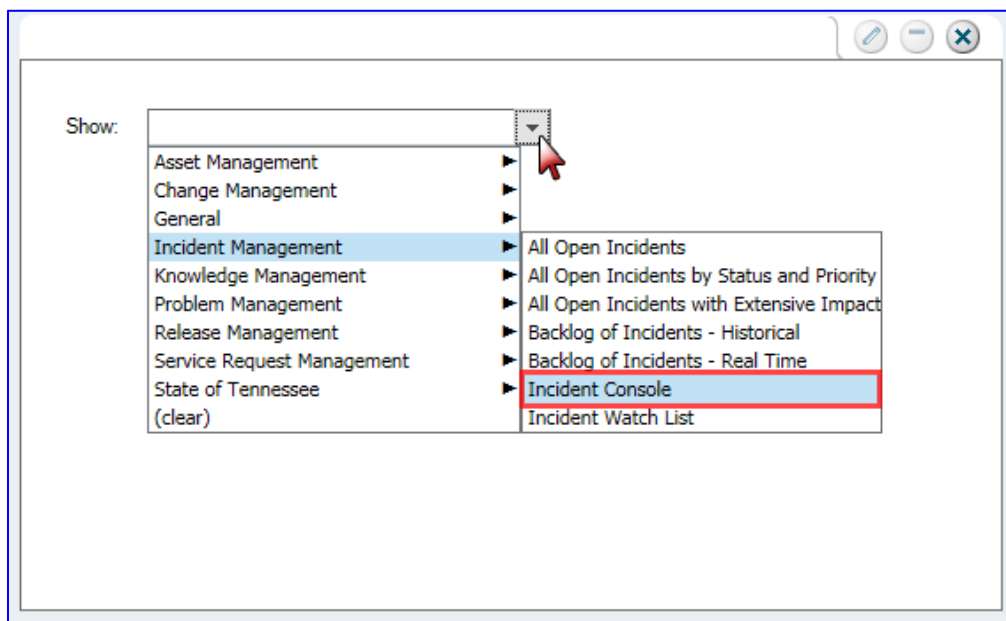


**Figure 3-13: Select Desired Display**

Once you have selected what you want to see, the screen will look like the following example.
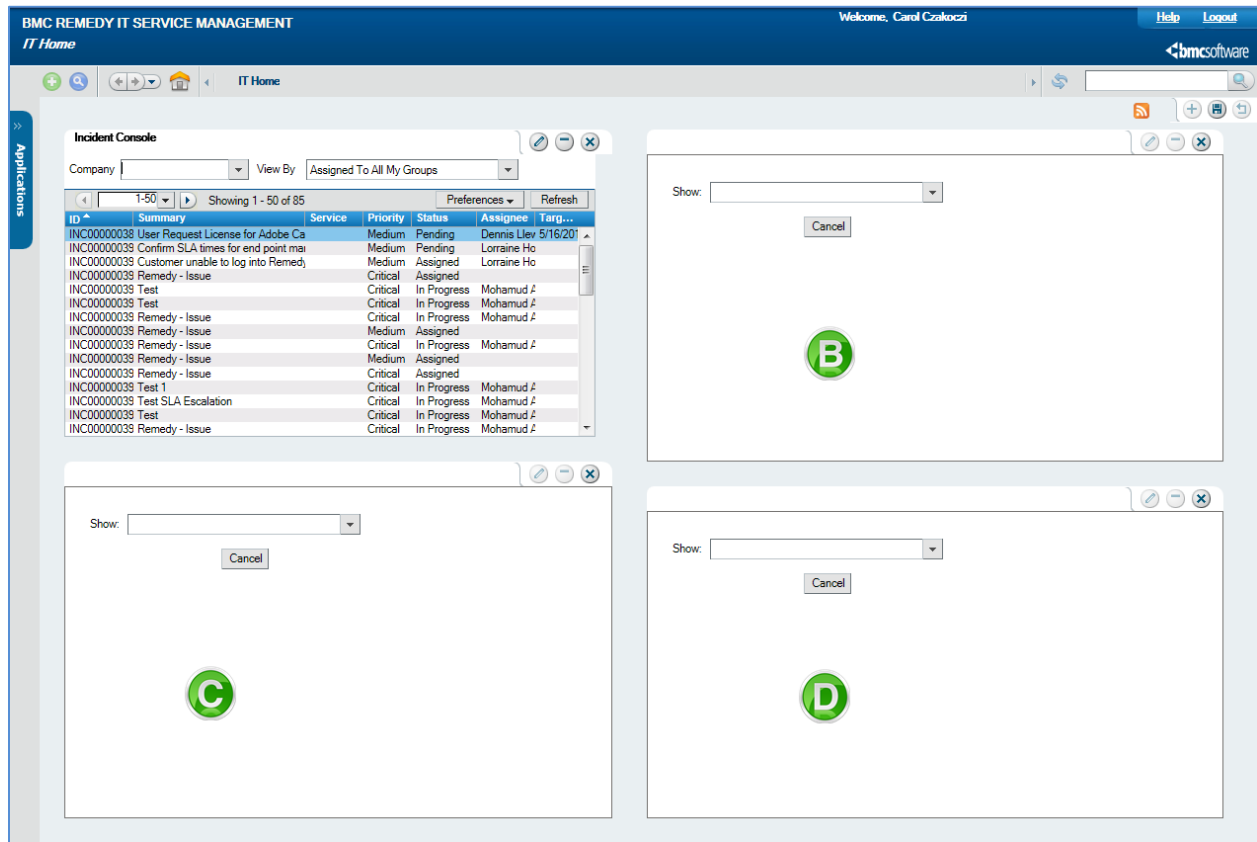


**Figure 3-14: IT Home Page with One Section Customized**

Since the goal is for two horizontal displays, repeat the selection process for section C. Once the console is displayed there, close section B and D. The results will look like the following figure where sections A and C have been labeled.

**Figure 3-15: IT Home Page Customized with Two Consoles**

Once the page has been customized to your liking, save the customization by clicking on the **Save** button in the upper right of the page as shown below.
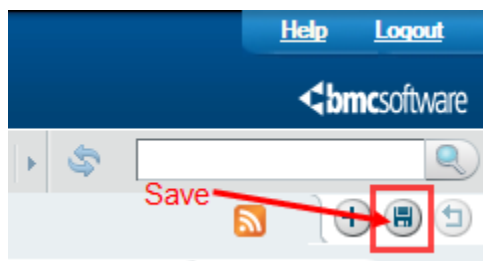


**Figure 3-16: Save IT Home Page Customization**

### 3.2.4   Customization Complete

The home page is now customized for you, enjoy your Remedy experience.

# 4   Browser Settings

**The State of Tennessee's standard browser is Microsoft Internet Explorer (IE) 9, 10, or 11 (if a Windows 8 machine).**

The following settings are recommended to be used. (Note: IE 9 was used for the following screen captures.)

## 4.1   Compatibility View

1) From the toolbar, click on **Tools** and select **Compatibility View settings**.
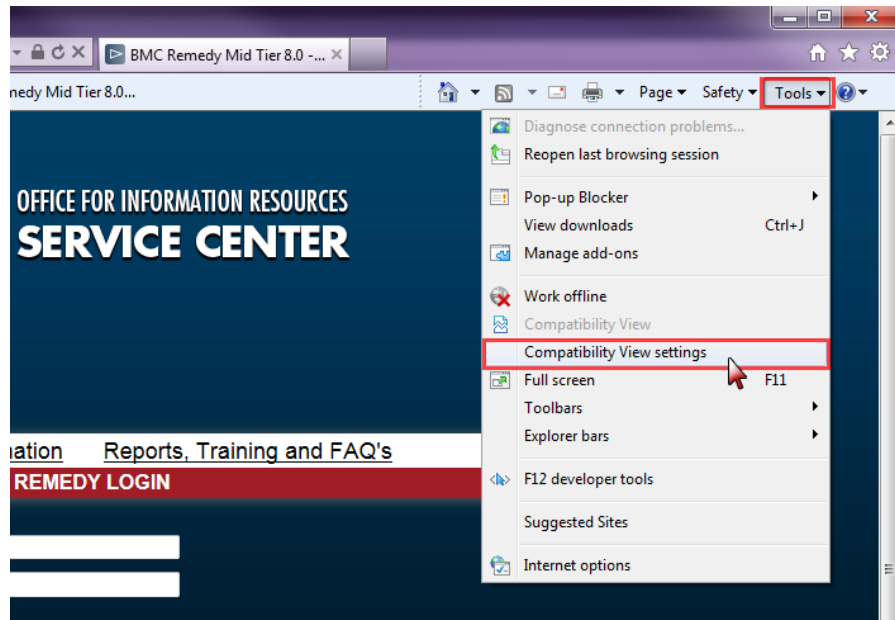


**Figure 4-1: Navigate to Compatibility View Settings**

2) When the **Compatibility View Settings** window pops up, click the **Add** button to add the current website to the list. You can enter other websites by typing the URL extension in the **Add this website** field.

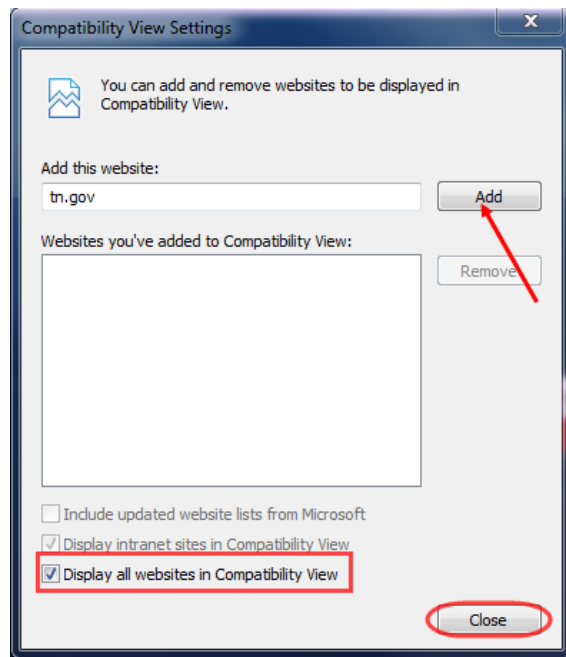**Figure 4-2: Compatibility View Settings Popup**

3) Check the **Display all websites in Compatibility View** checkbox.

4) Click the **Close** button to apply the changes.

## 4.2   Internet Options

From the toolbar, click on **Tools** and select **Internet Options** to bring up the **Internet Options** popup (Figure 4-4).
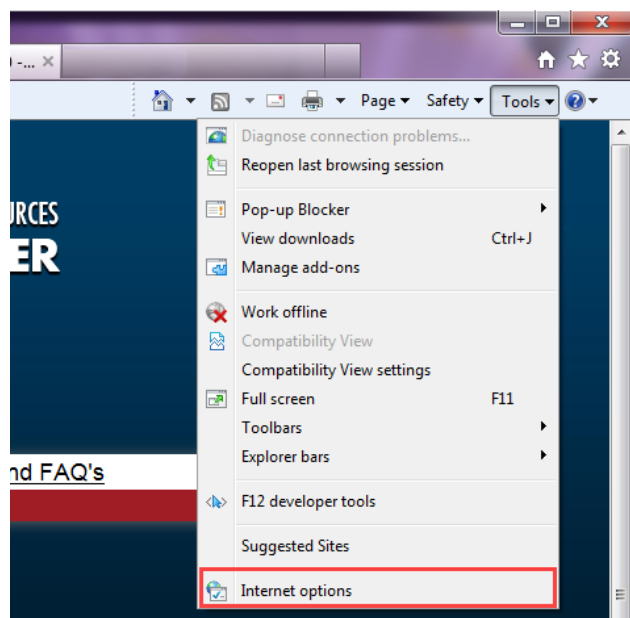
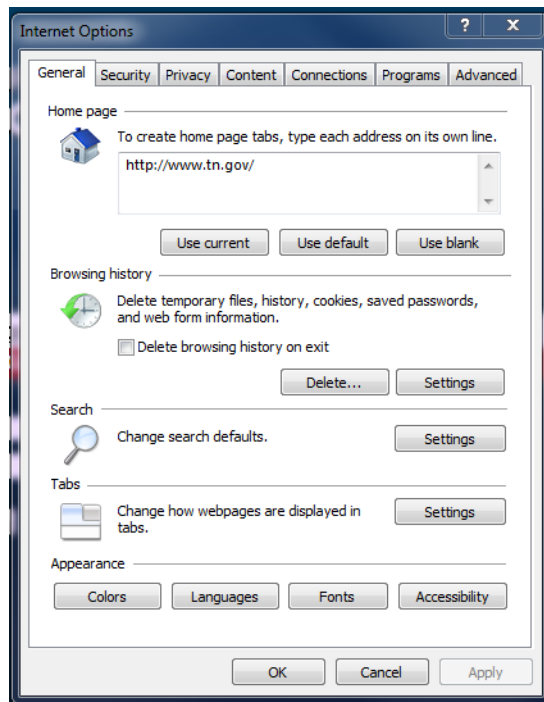

**Figure 4-3: Navigate to Internet Options**

**Figure 4-4: Internet Options Popup**

### 4.2.1   Browsing History Settings

1)  From the Internet Options popup, in the **Browsing History** section, click on the **Settings** button to access up the **Temporary Internet Files and History Settings** popup.
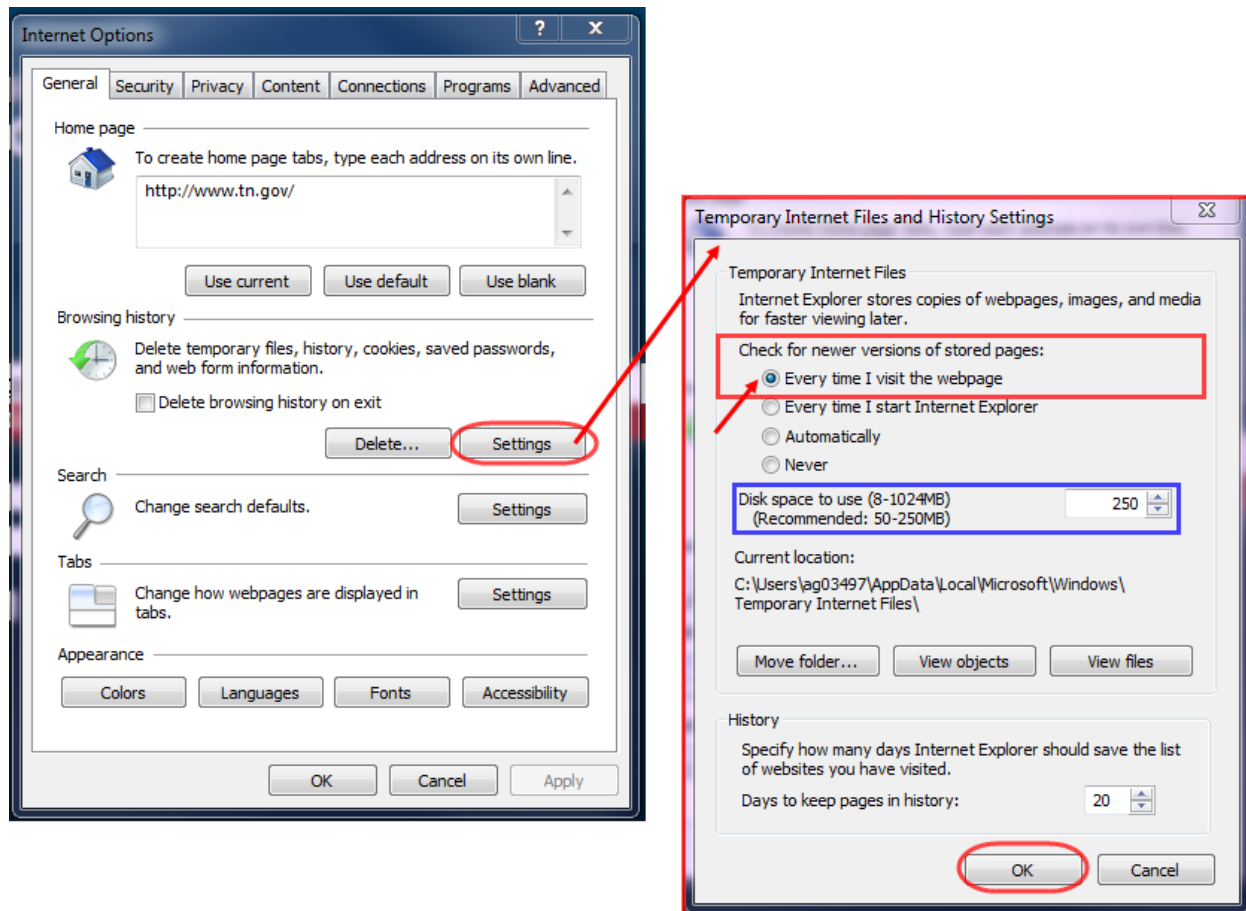
**Figure 4-5: Browsing History Settings**

2) Select the first option (**Every time I visit the webpage**) for the **Check for new versions of stored pages** field.

3) Set the **Disk space to use** to 250, if necessary.

4) Click **OK** to save your changes and close the popup and return to the **Internet Options** popup.

## 4.2.2   Tabs Setup

In order to allow Remedy to open new windows in tabs instead of opening multiple browser windows, follow these instructions.

1) From the Internet Options popup, in the **Tabs** section, click on the **Settings** button to access up the **Tabbed Browsing Settings** popup.
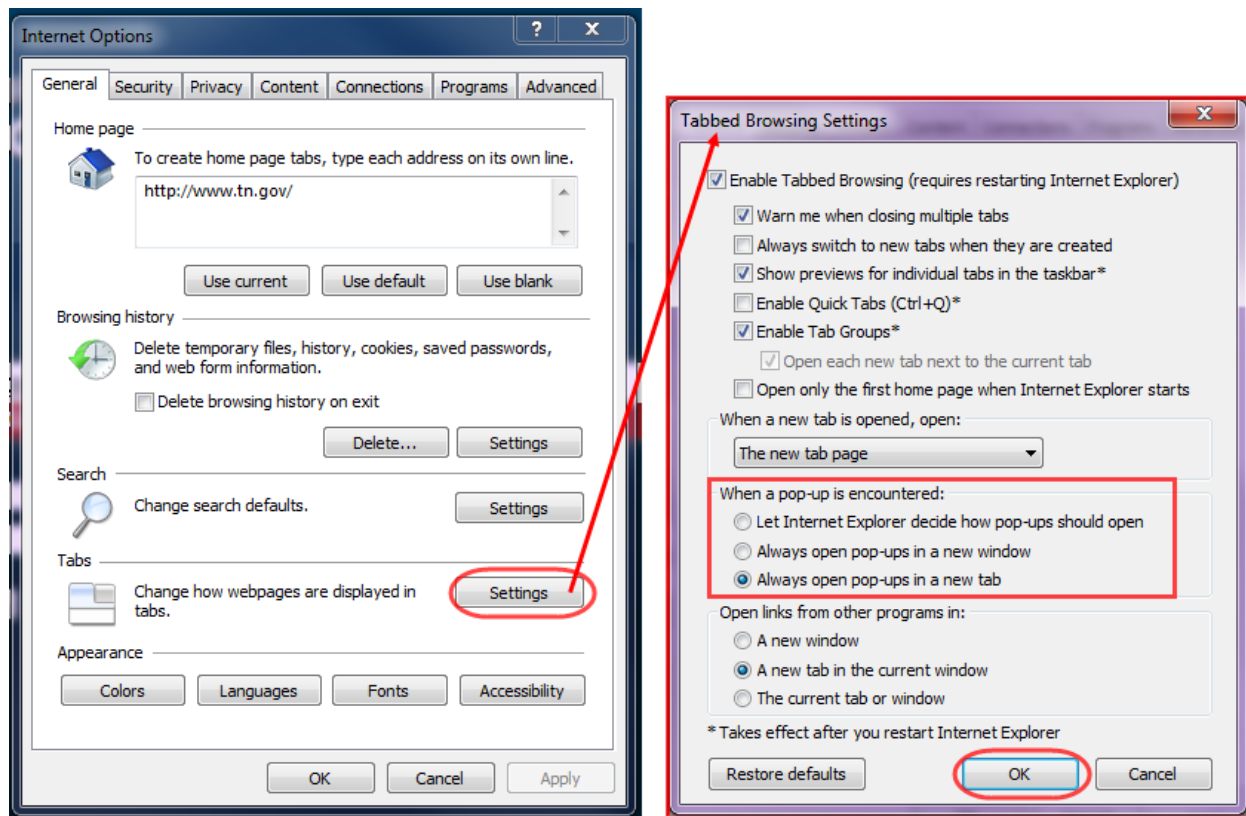
**Figure 4-6: Tabbed Browsing Setup**

2)  On the **Tabbed Browsing Settings** popup, select the last option (**Always open pop-ups in a new tab**) for the **When a pop-up is encountered** field.

3)  Click **OK** to save your changes and close the popup and return to the **Internet Options** popup.

### 4.2.3   Complete the Setup

When you have completed modifying the settings, click OK to close the Internet Options popup. You may need to restart your browser in order for the changes to take effect. (You will need to close all instances of the browser before restarting.)
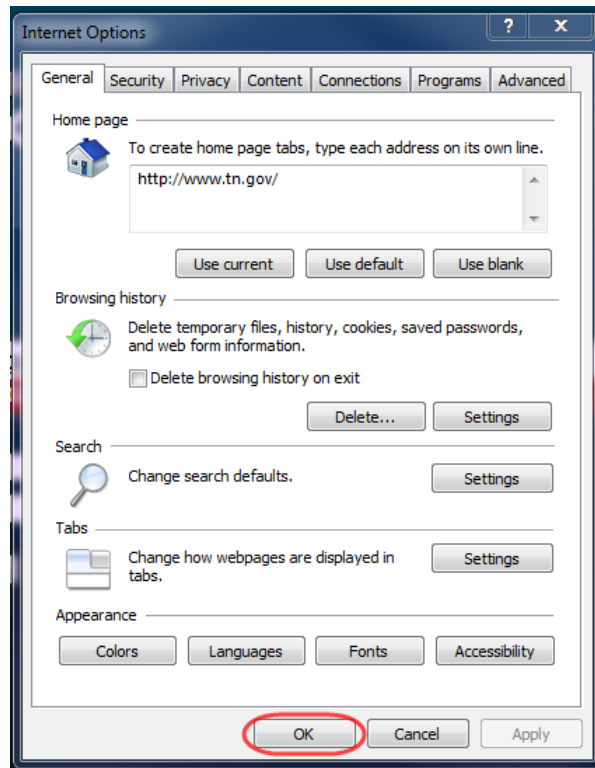
**Figure 4-7: Close Internet Options**

## 4.3 Clearing the Browser Cache

Sometimes issues you may experience with Remedy will be resolved by clearing the browser's cache or memory. Follow the instructions below to clear the cache.

1) From the toolbar, click on **Tools** and select **Internet Options** to bring up the **Internet Options** popup (Figure 4-8).
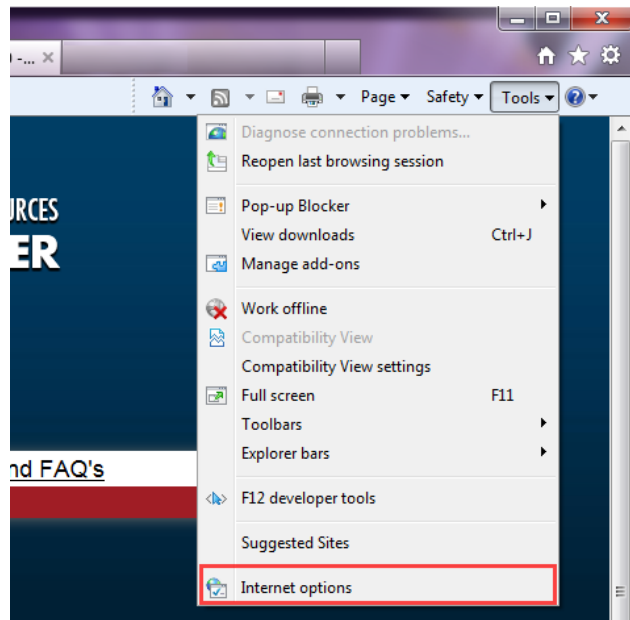
**Figure 4-8: Navigate to Internet Options**

2) In the **Browsing history** section of the **Internet Options** popup, click on the **Delete…** button to bring up the **Delete Browsing History** popup.
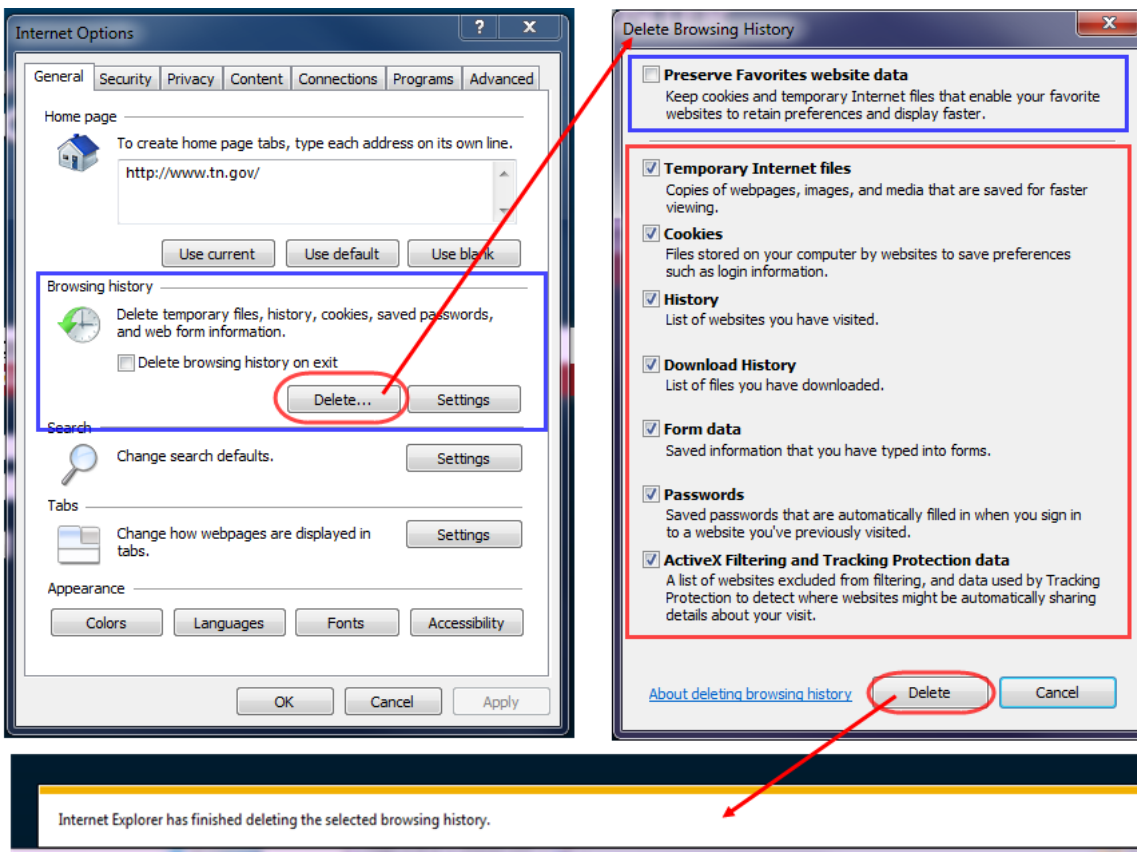


**Figure 4-9: Delete Browsing History Popup**

3) On the **Delete Browsing History** popup, **uncheck** the first options: **Preserve Favorites website data** (blue box on the right screen in figure 4-8).

4) **Check all other options** on the **Delete Browsing History** popup.

5) Click the **Delete** button.

6) When the action is complete, the popup will close, display a message at the bottom of the browser, and return you back to the **Internet Options** popup.

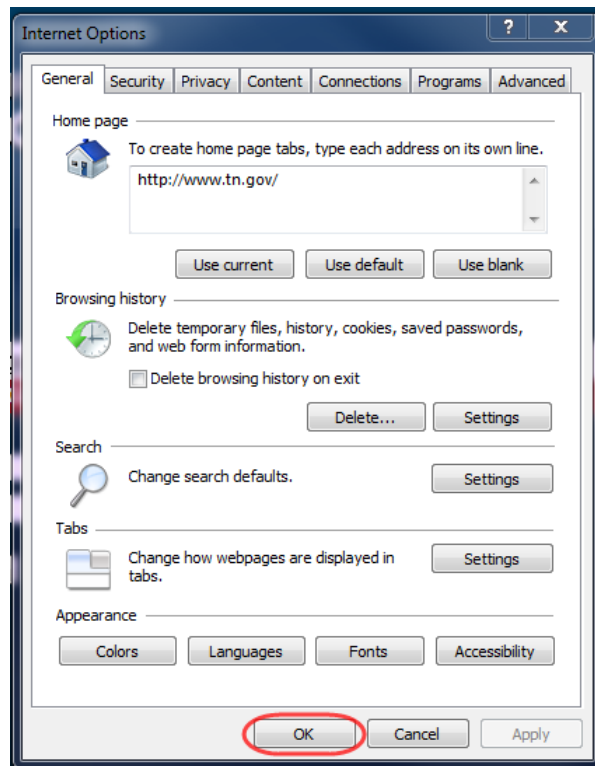7) Click **OK** to close the popup, as shown in Figure 4-9 below.



**Figure 4-10: Close Internet Options**

Enjoy your Remedy 8.1 experience.

To report a problem, please contact the OIR Service Desk at 615-741-1001, Option #3